

10 Mega Trends that are (re)shaping our world

Simon Atkinson





Mega trends

...that are (re) shaping the world



1. Dynamic Populations

The Global population continues to **grow**



1976

4,136,542

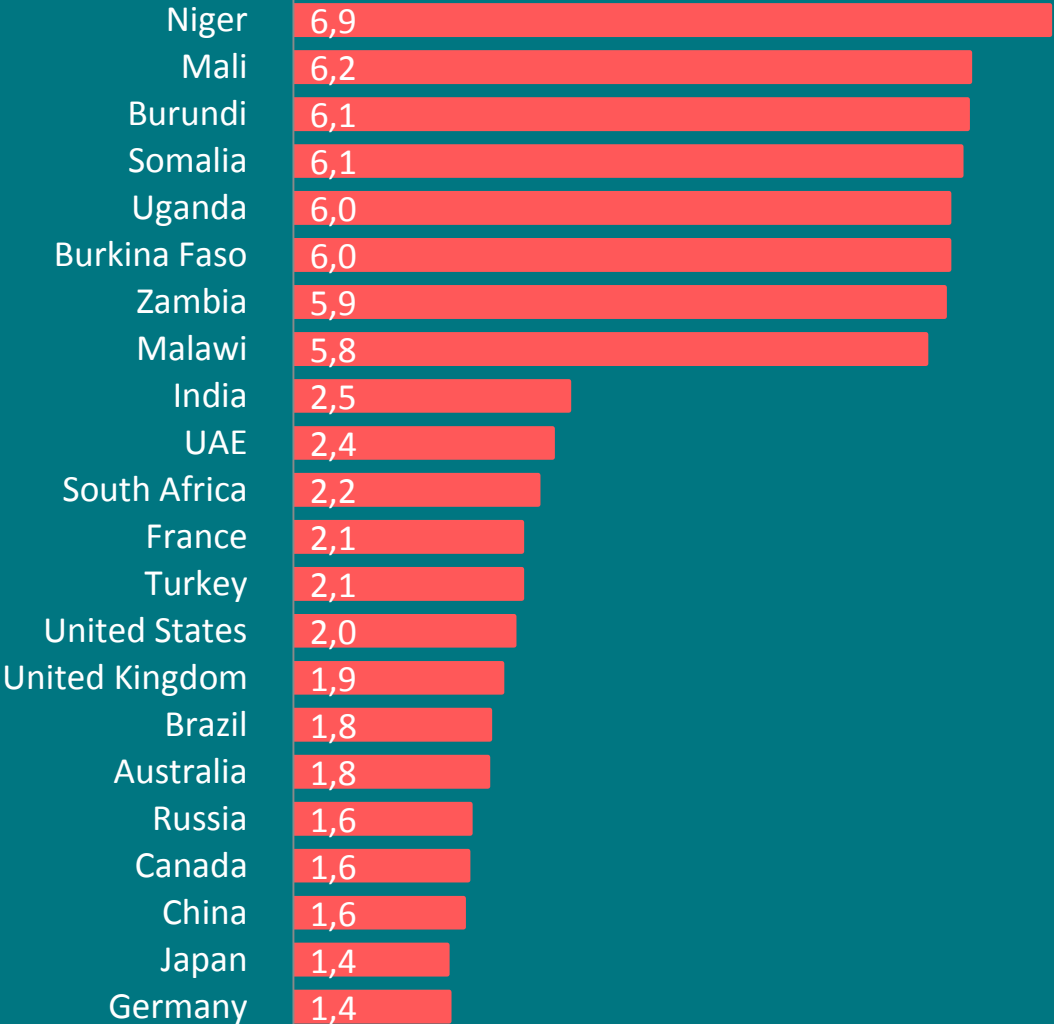
2016

7,431,209

2050

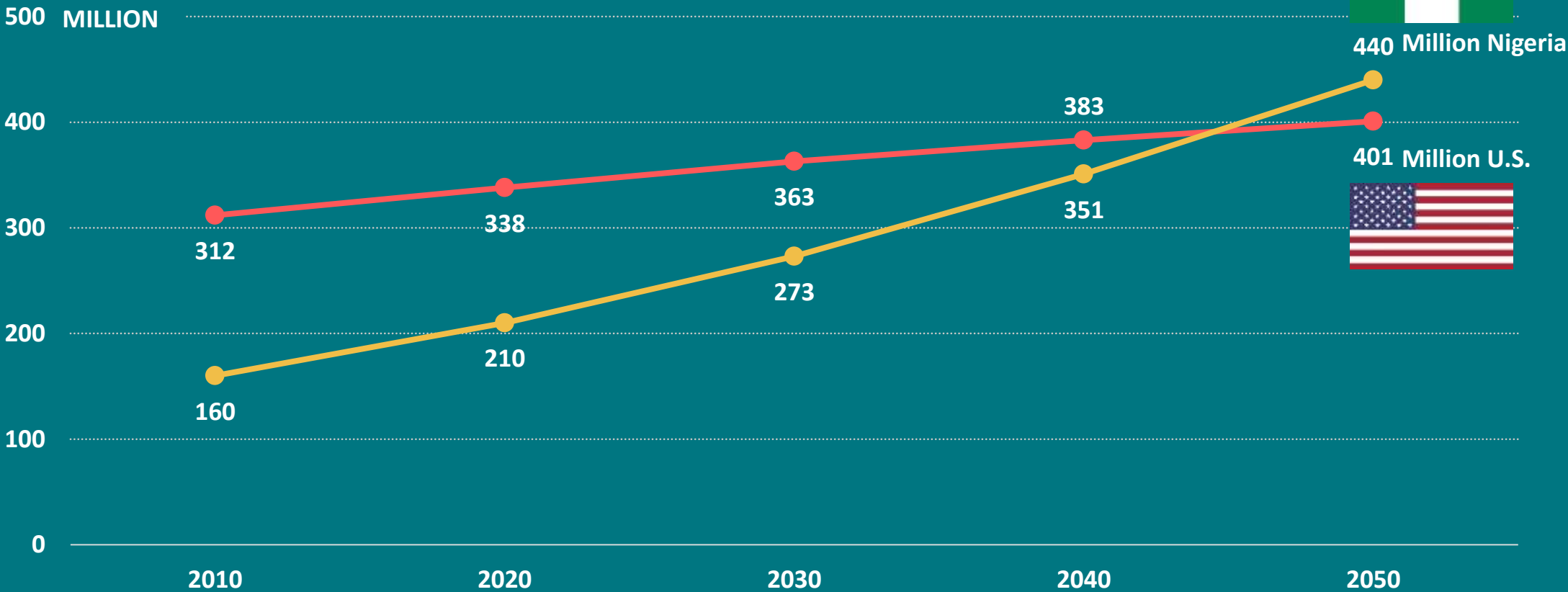
9,725,148

Powered by high birth rates in **some** countries



Big Changes Ahead....

Estimated population from 2010 to 2050 in U.S. and Nigeria



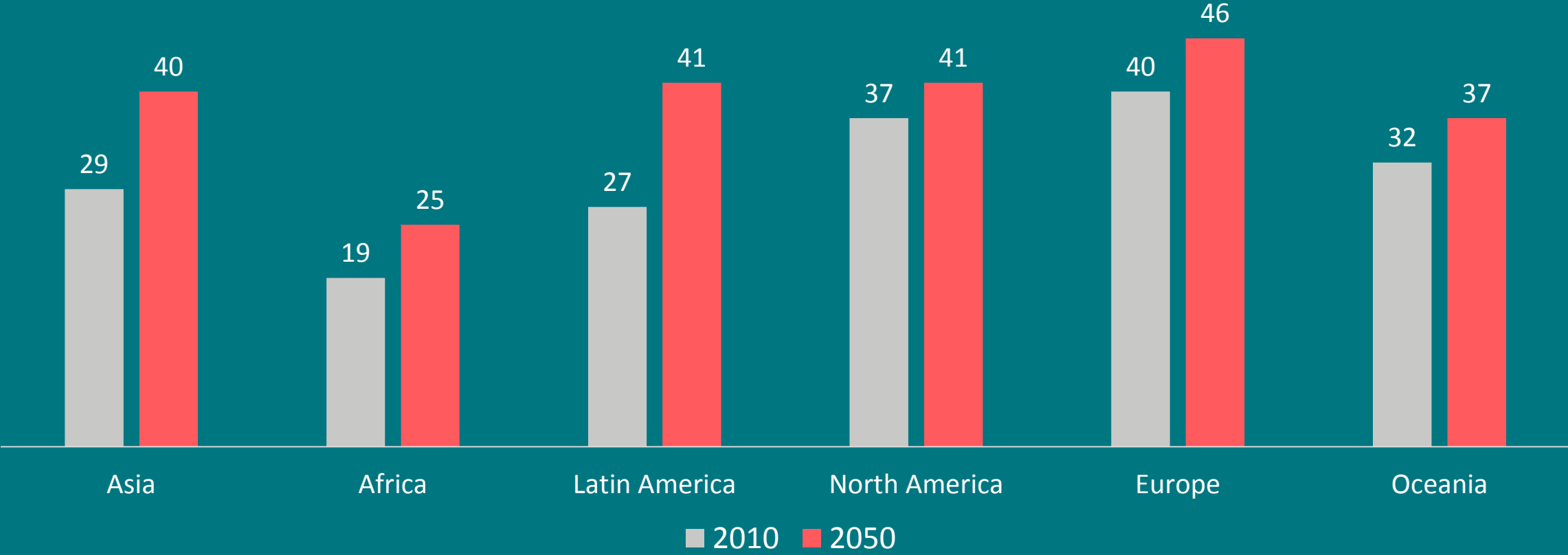
440 Million Nigeria



401 Million U.S.

But the global population is getting older

Median age (years), Estimates for 2010 and 2050



In 1950, life expectancy in **China**
was **40 years**.

By 2050, this will have
risen to **80 years**.



2. Growing Opportunity and Growing Inequality



Global population and global middle class population



2009

6.8 billion

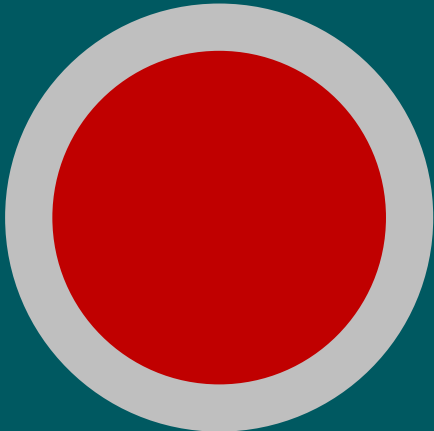
1.8 billion



2020

7.7 billion

3.2 billion



2030

8.3 billion

4.9 billion

By 2030, **66%** of the
world's middle classes
will be living in Asia

...which should be
no surprise to anyone!

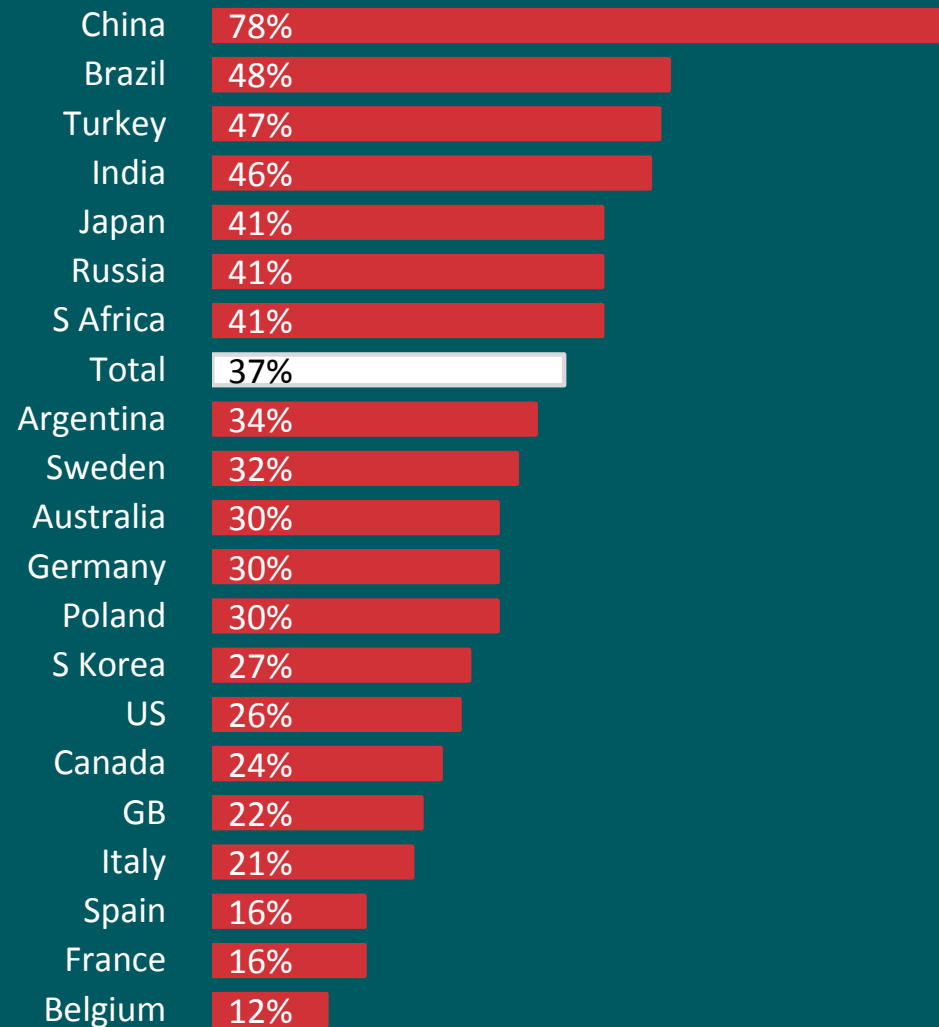


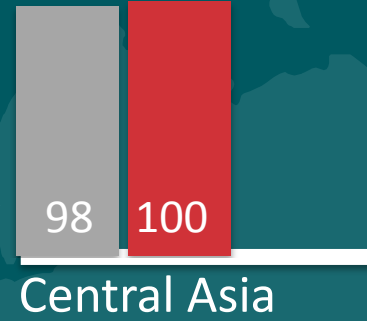
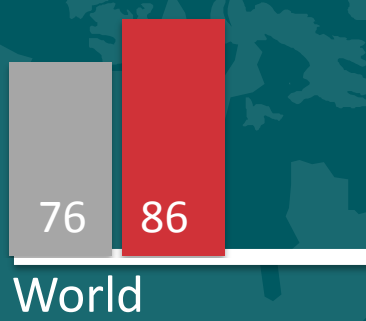
There are **more people**
living inside this circle
than outside of it

Growing Opportunity?

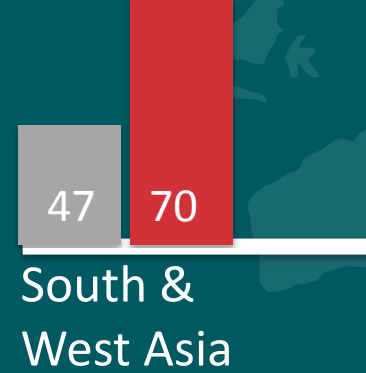
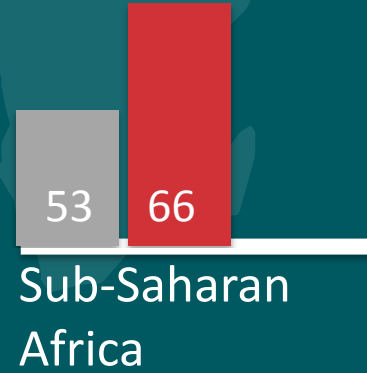
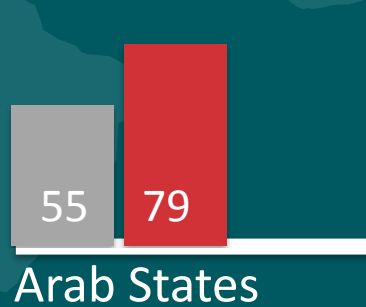
Young in developing countries are optimistic

% of under 30s who expect life to be better





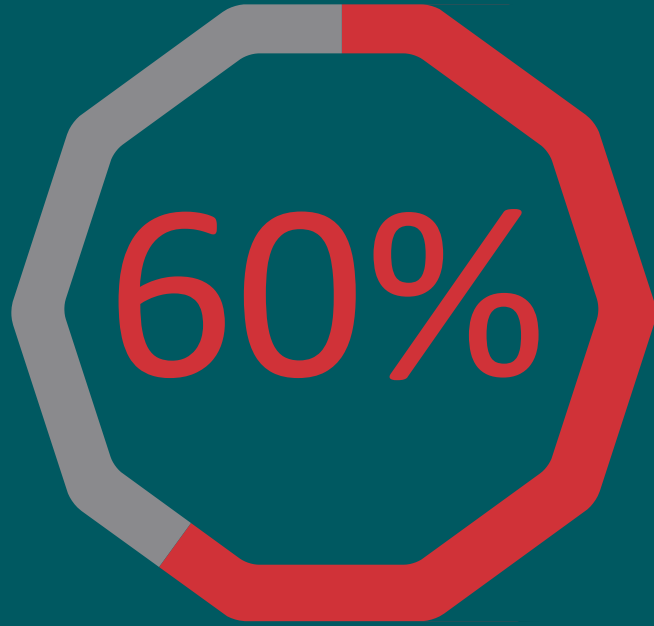
Objective (nearly) achieved? Adult Literacy rates 1990-2015



50%



Internet usage: the point where the web starts to have a real impact on economic development

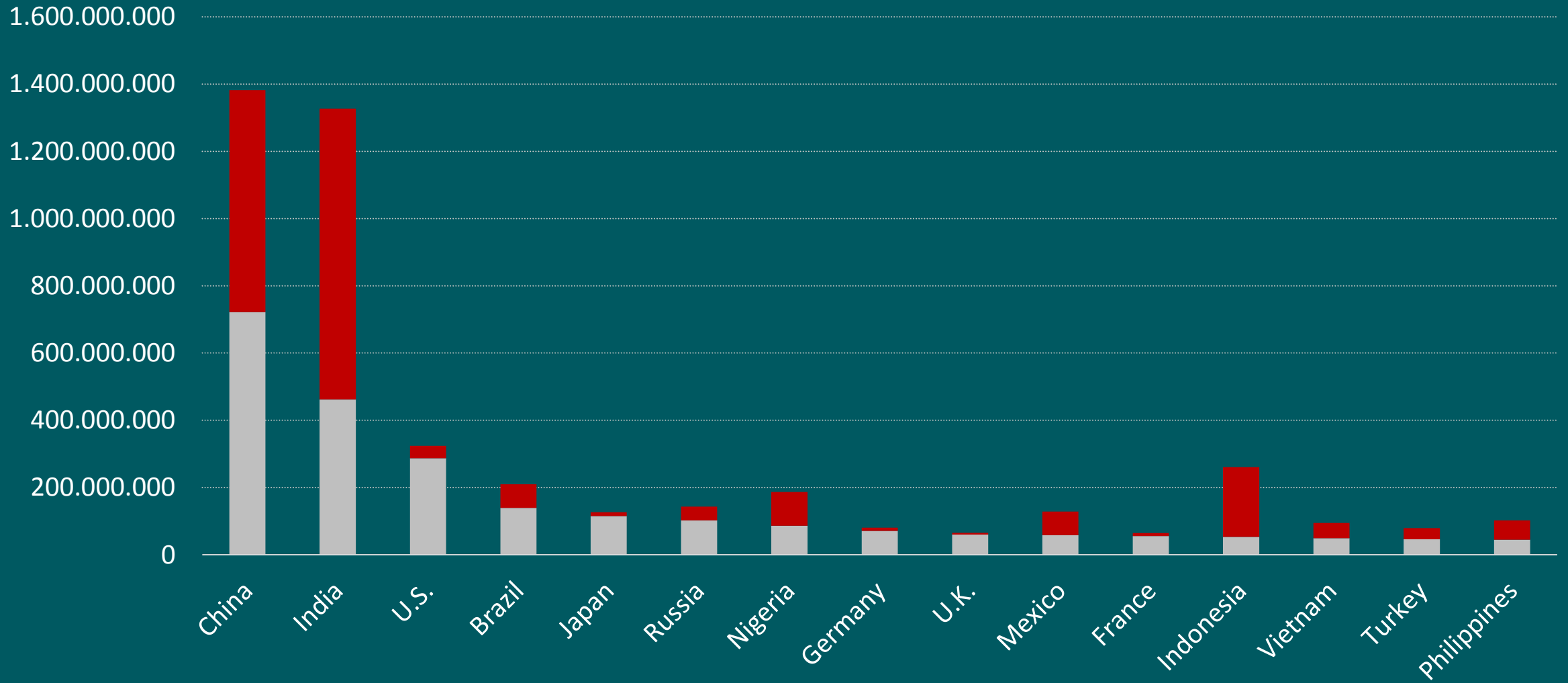


of the global
population
has **no internet
access**



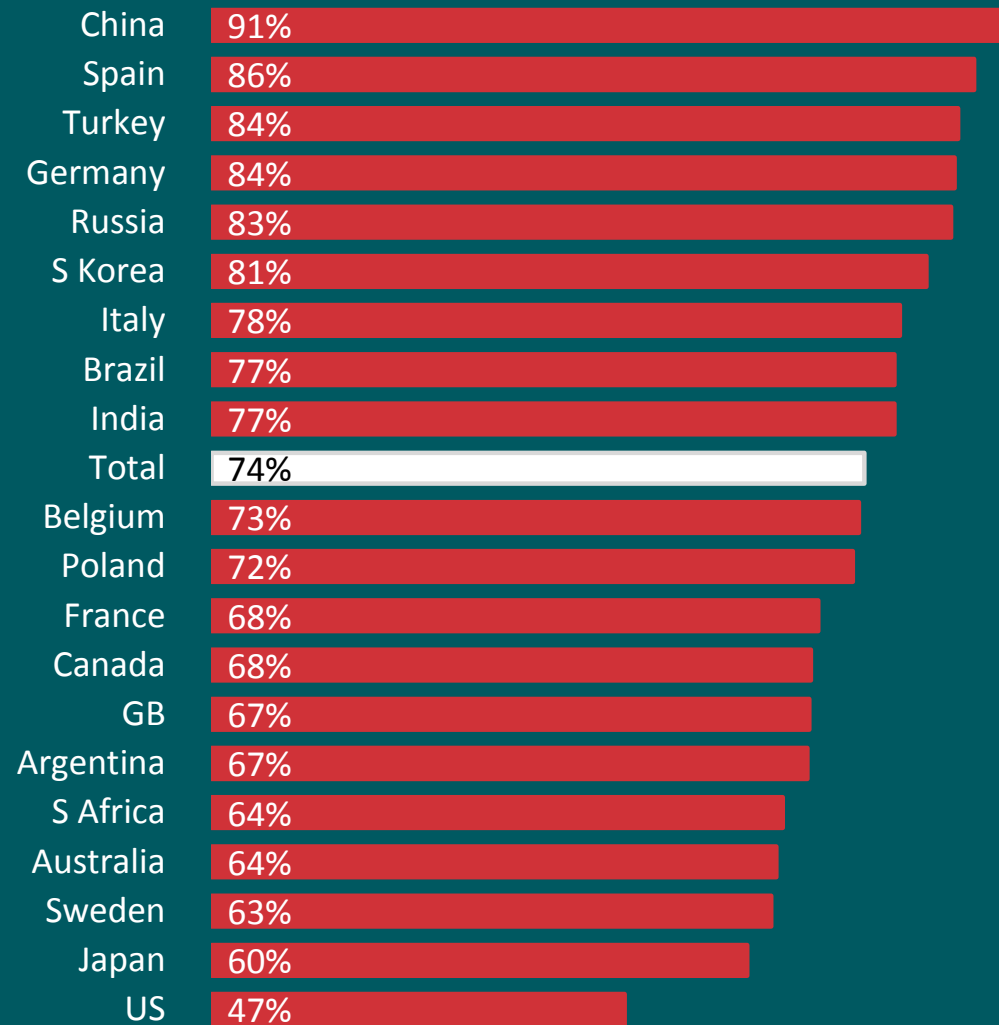
■ Internet Users (2016)

■ Non-Users (internetless)



Growing Inequality? It worries us

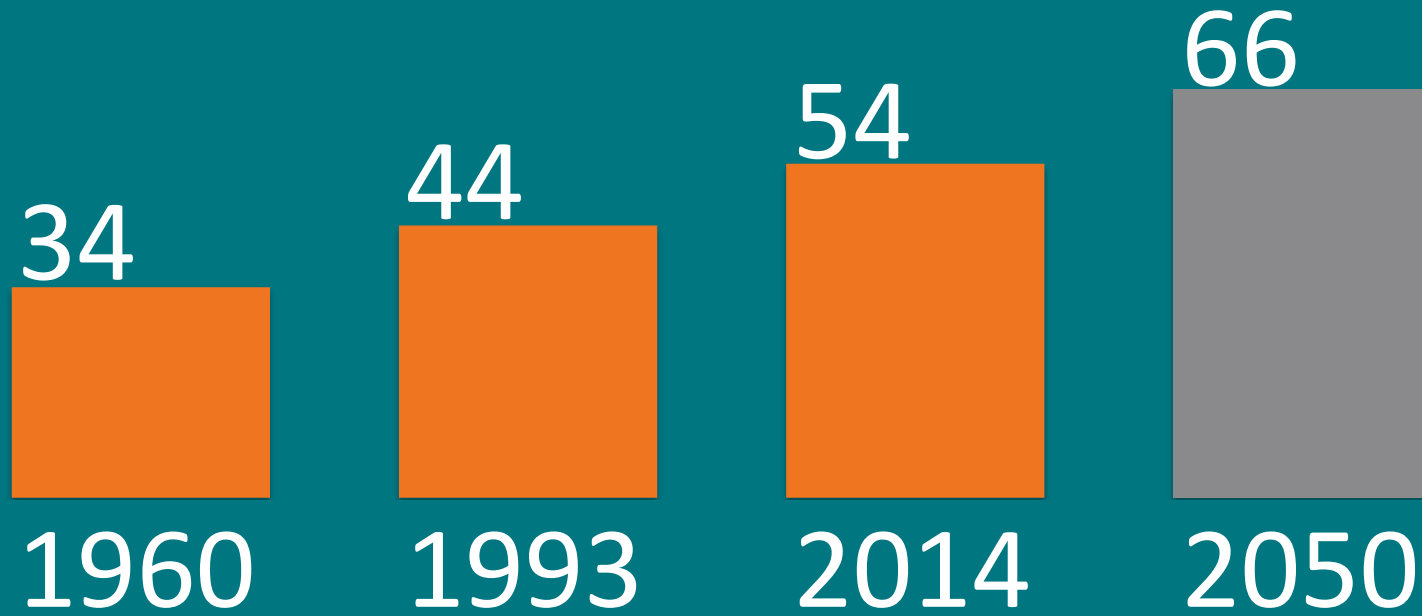
% agree
Having large
differences in
income and
wealth is bad
for society
overall





3. Megacities





% of the World's population living in urban areas

The urban population is
increasing by...

50,000 a day

1.5 million

a month

(a city the size of Prague)



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18 million

a year

(the population
of Chile)



Africa

Will gradually
replace Asia as
the region with
highest urban
growth rate



Africa

Lagos 21 million

Cairo 15 million

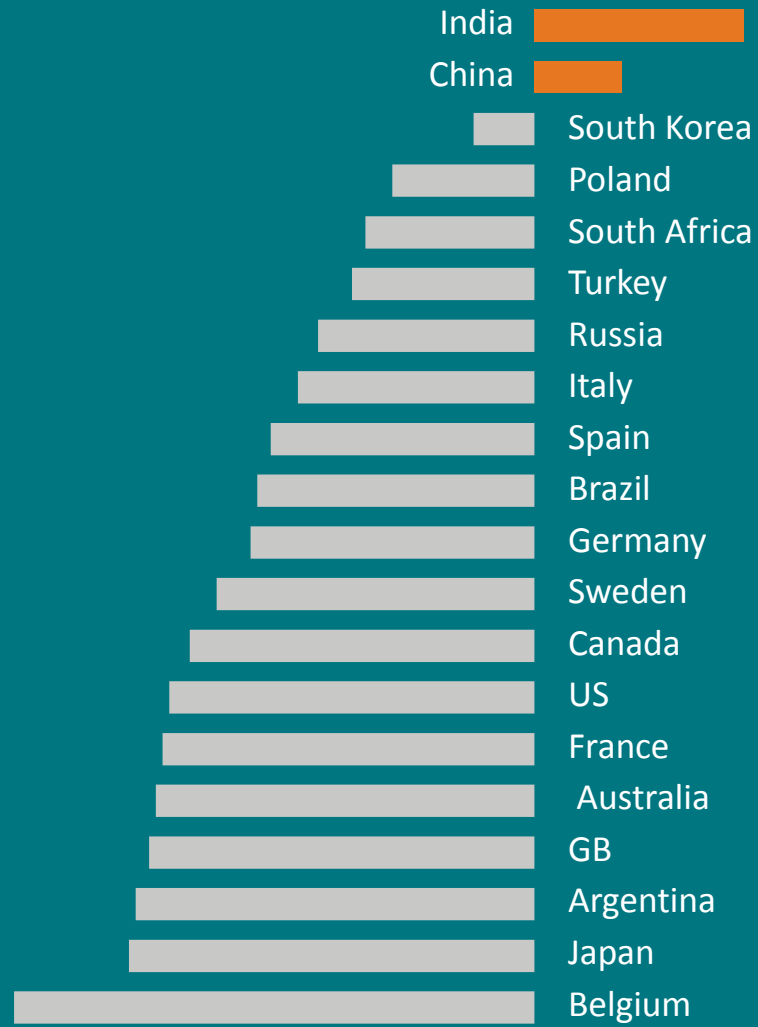
Kinshasa 9 million



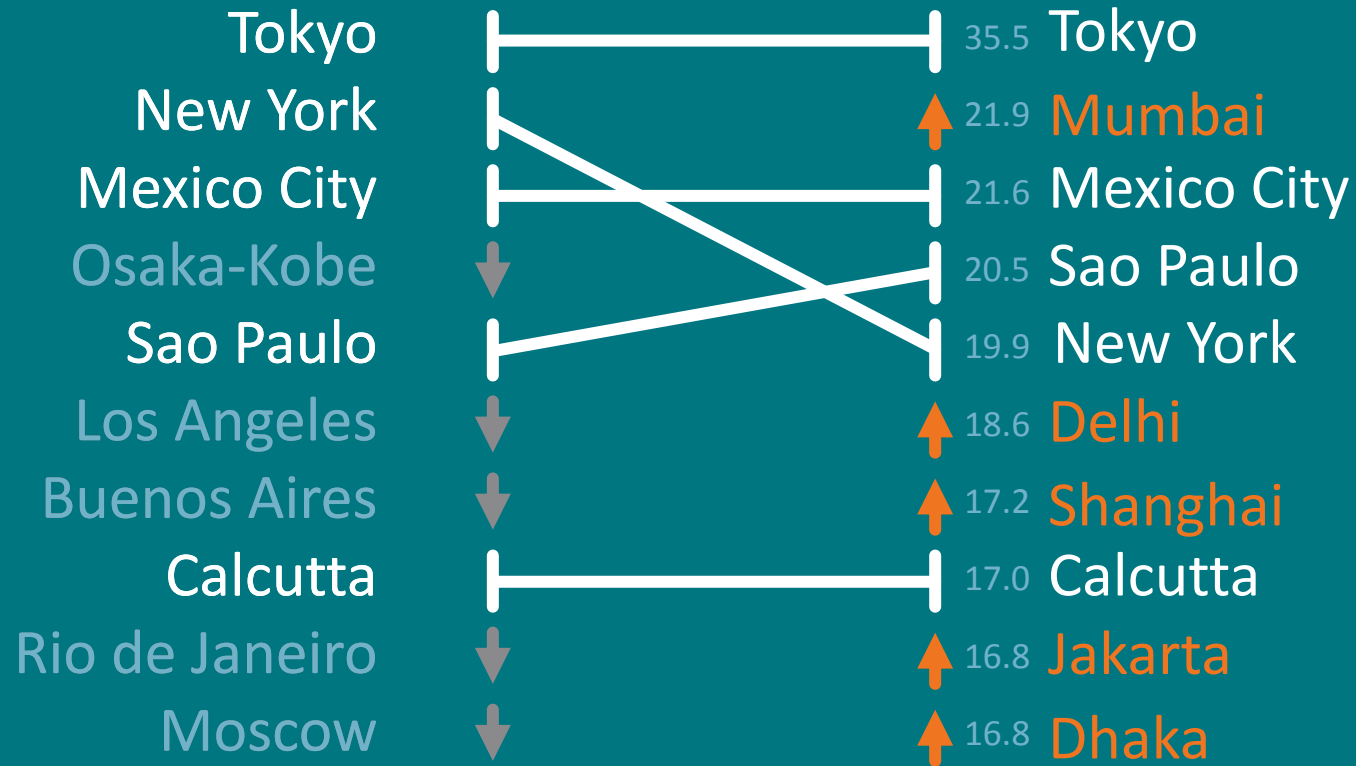
City Living

A choice rather
than a necessity?

Want to live in cities?



Have to live in cities?



1975

2015



**4. Increasing
connectedness and
decreasing privacy**







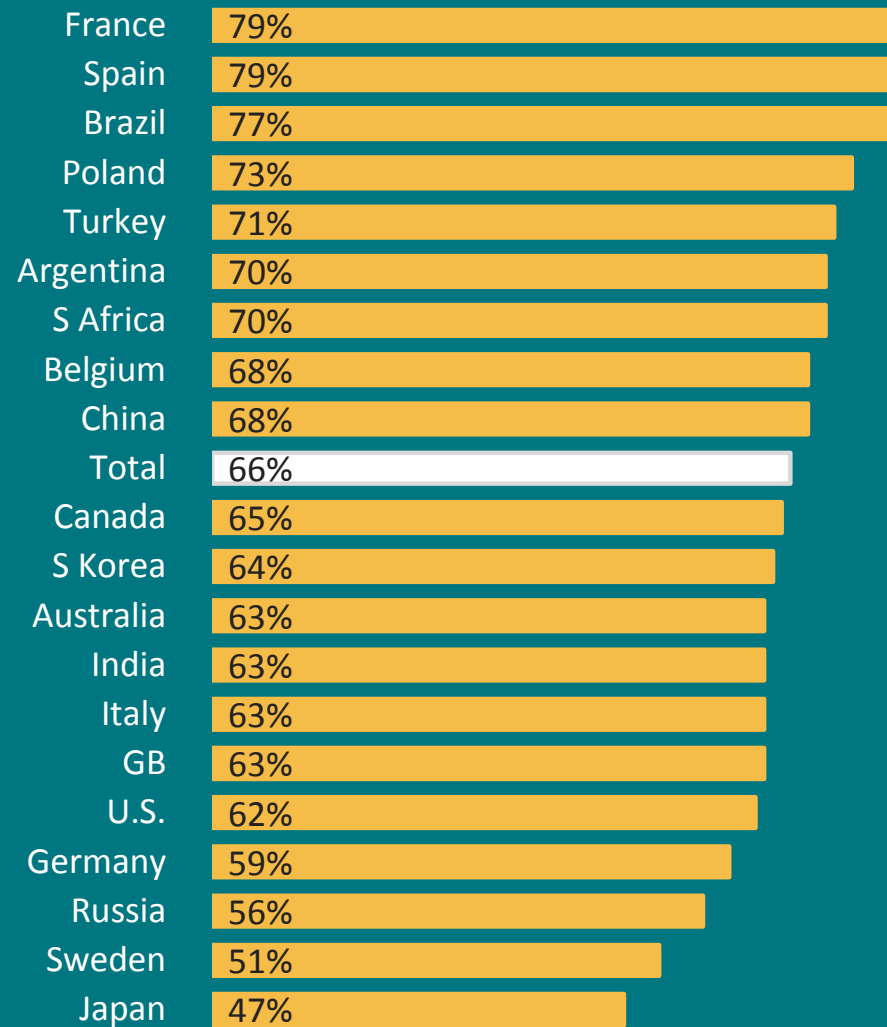
of the global
population
has **no internet
access**





of global internet users say access to the web should be a “**basic human right**”

% agree
I worry that
companies can
access my posts
on social
networking sites
for information
about goods and
services I have
purchased



And is it changing our behaviour?

78%

“The level of interrupt, the sort of overwhelming rapidity of information... is in fact **affecting cognition**”

Eric Schmidt - Google

‘Facebook Home could **change our brains**’

Susan Greenfield -
Neuroscientist

In China say they are ‘**constantly looking at screens** these days’

And is it changing our behaviour?

79%

“The level of interrupt, the sort of overwhelming rapidity of information... is in fact affecting cognition”

Eric Schmidt - Google

‘Facebook Home could change our brains’

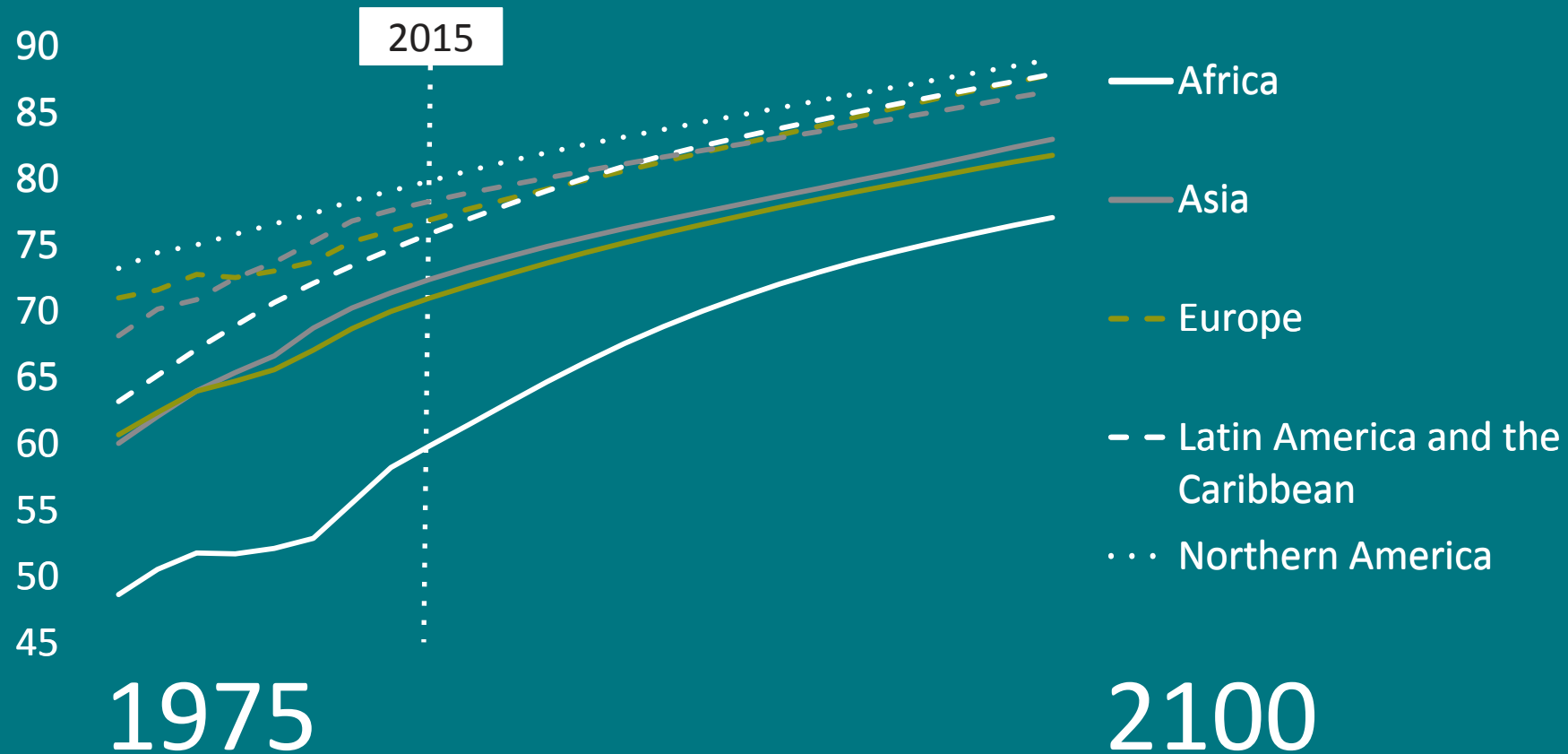
Susan Greenfield -
Neuroscientist

Of Chinese under 30s feel “restless or uneasy” if they don’t look at their phone for an hour

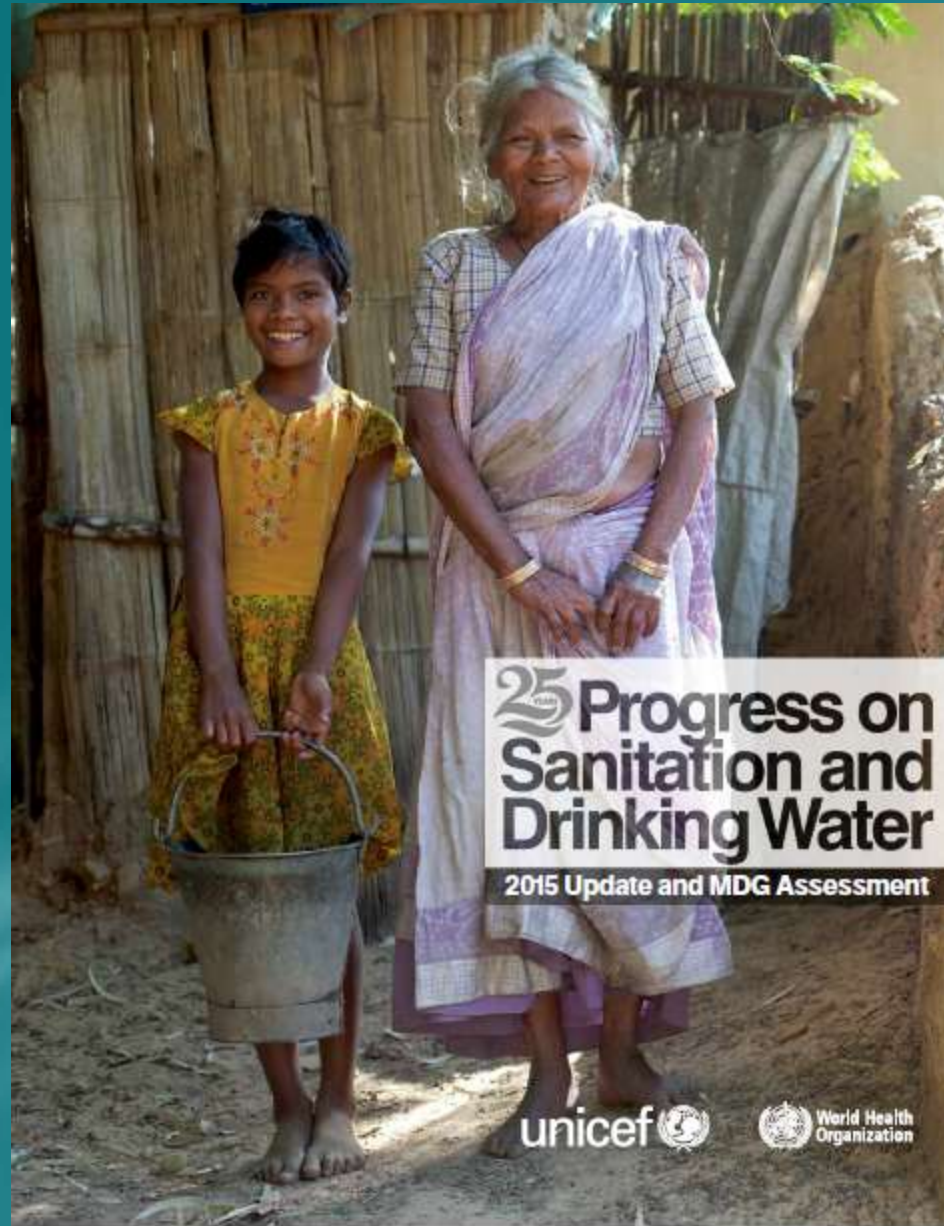


5. Healthier and sicker

Global life expectancy is rising...



**But there is still
work to do...**



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91% now have access to
improved drinking water

2,000 child deaths
from diarrhoea in 2000

<1,000 today

Millennium **TARGET MISSED**
700,000,000 people

1 in 3

of the World's population
do not have access to
adequate sanitation facilities

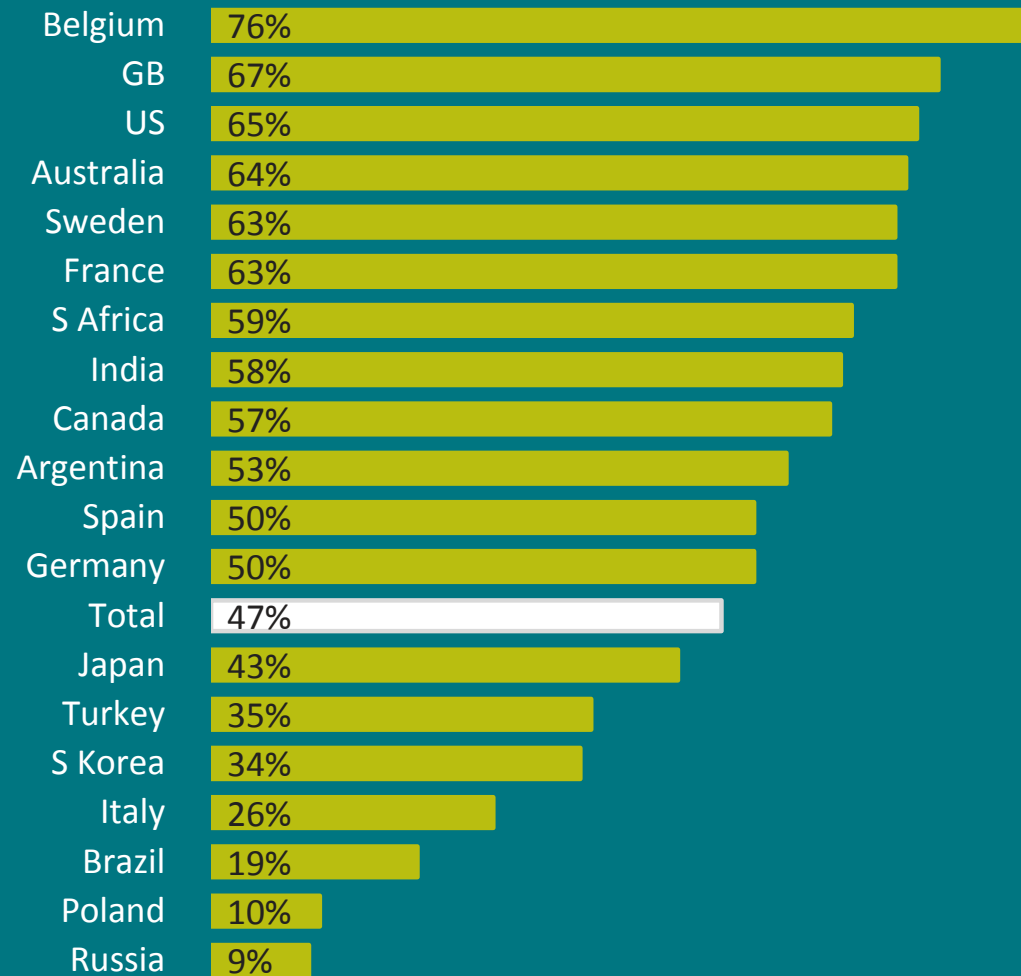
Uncertainty #1
**Can our healthcare
systems cope?**

Uncertainty #1

Can our healthcare systems cope?

% good

How would you rate the quality of healthcare that you and your family have access to in ...?



Uncertainty #2
**Our own
lifestyle choices**

Most of the world's population now lives in countries where **being overweight or obese kills more people than being underweight**

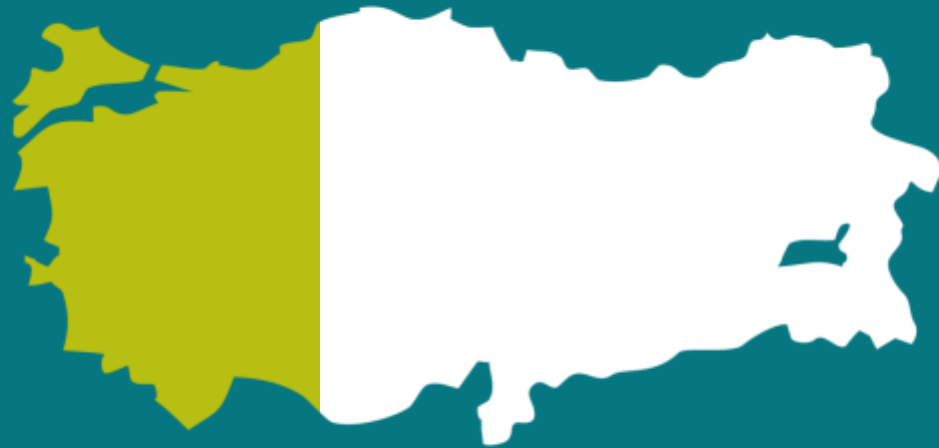


Turkey: we think 32% of us
“are overweight or obese”



Turkey ~~32%~~ **65%**

are overweight or obese



Uncertainty #3
Climate change

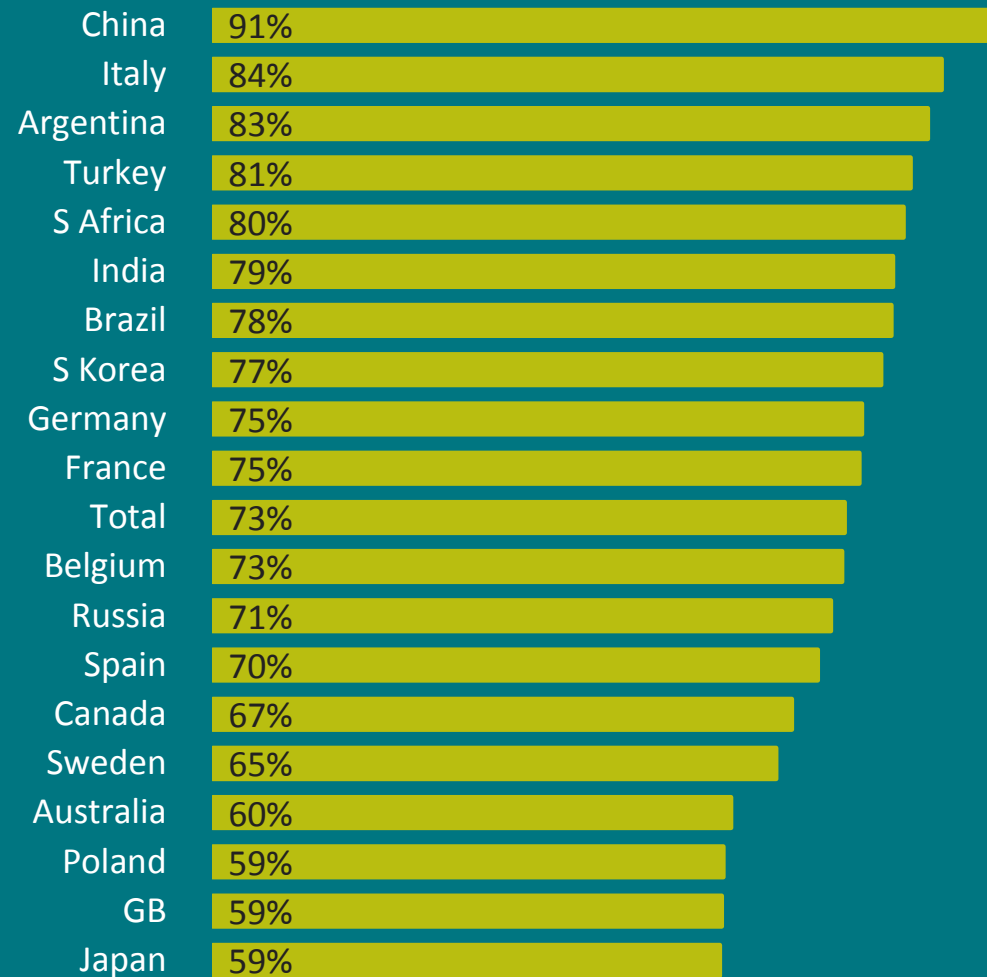
Uncertainty #3
Climate change

Globally, 70%
agree there's **solid
evidence the Earth
is getting warmer**

Uncertainty #3 Climate change

% agree

We are heading for
environmental disaster
unless we change our
habits quickly





6. Rise of individual choice and fracturing of the mass market



Where was Apple
40 years ago...?



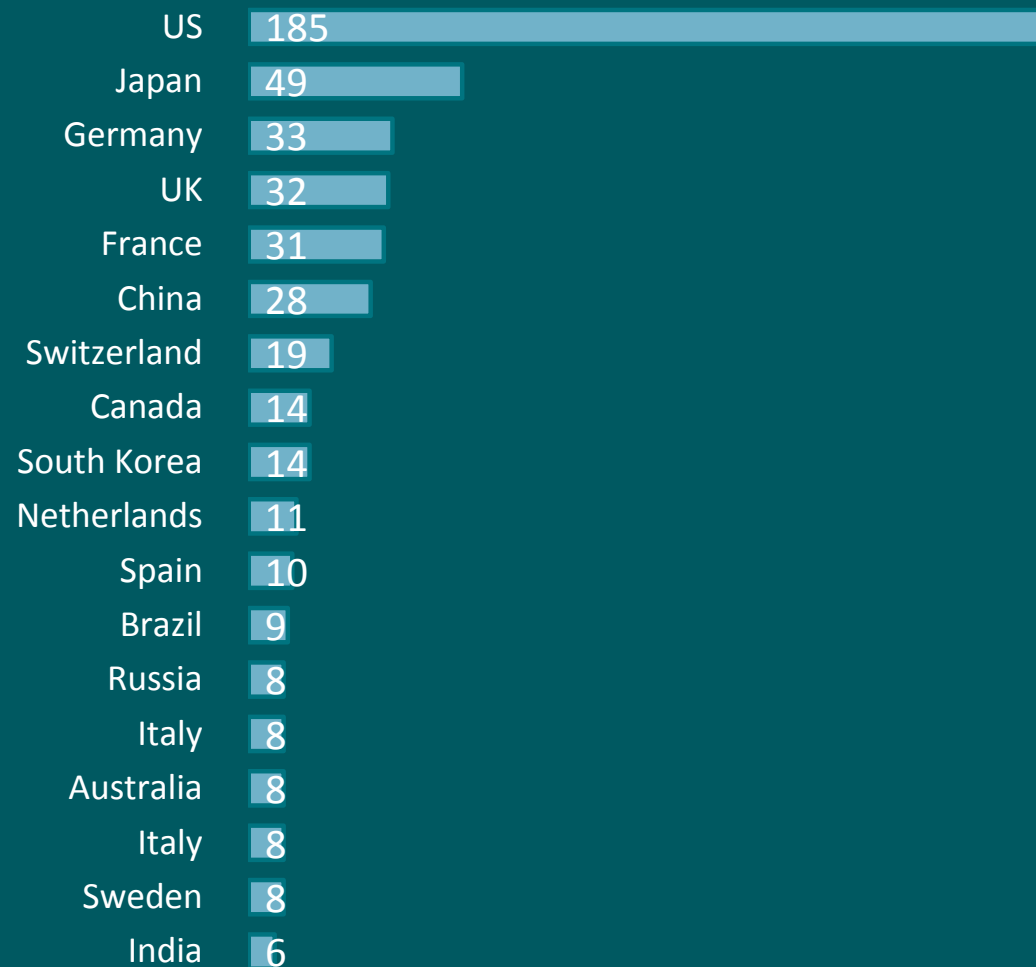
1976



2016

But big brands are not always American

Brand Finance
Global 500
home country of
each brand





vodafone



Shell



中国移动通信
CHINA MOBILE



Bradesco



GENERALI
Asigurări



Santander



Nestlé



RBC
Royal Bank

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The mass market:
what we are used
to is **changing**

The mass market:
what we are used
to is **changing**

Example #1:
Motoring



home > opinion columnists

Self-driving cars Opinion

Driverless cars: the slow, sad death of joyous motoring, one satnav at a time

Gaby Hinsliff



You don't have to be a petrolhead to dread the moment when driving for pleasure is no more

cars at all.





GAME CHANGERS



The mass market:
what we are used
to is **changing**

Example #2:
**Business
Presentations**

A slide seen in business strategy presentations around the world...

A slide seen in business strategy presentations around the world...

UBER The world's largest taxi company owns no vehicles

airbnb The largest accommodation provider owns no real estate

facebook The most popular media provider creates no content

Instagram The most valuable photo company sells no cameras

NETFLIX The fastest growing television network lays no cables

Alibaba.com The most valuable retailer has no inventory

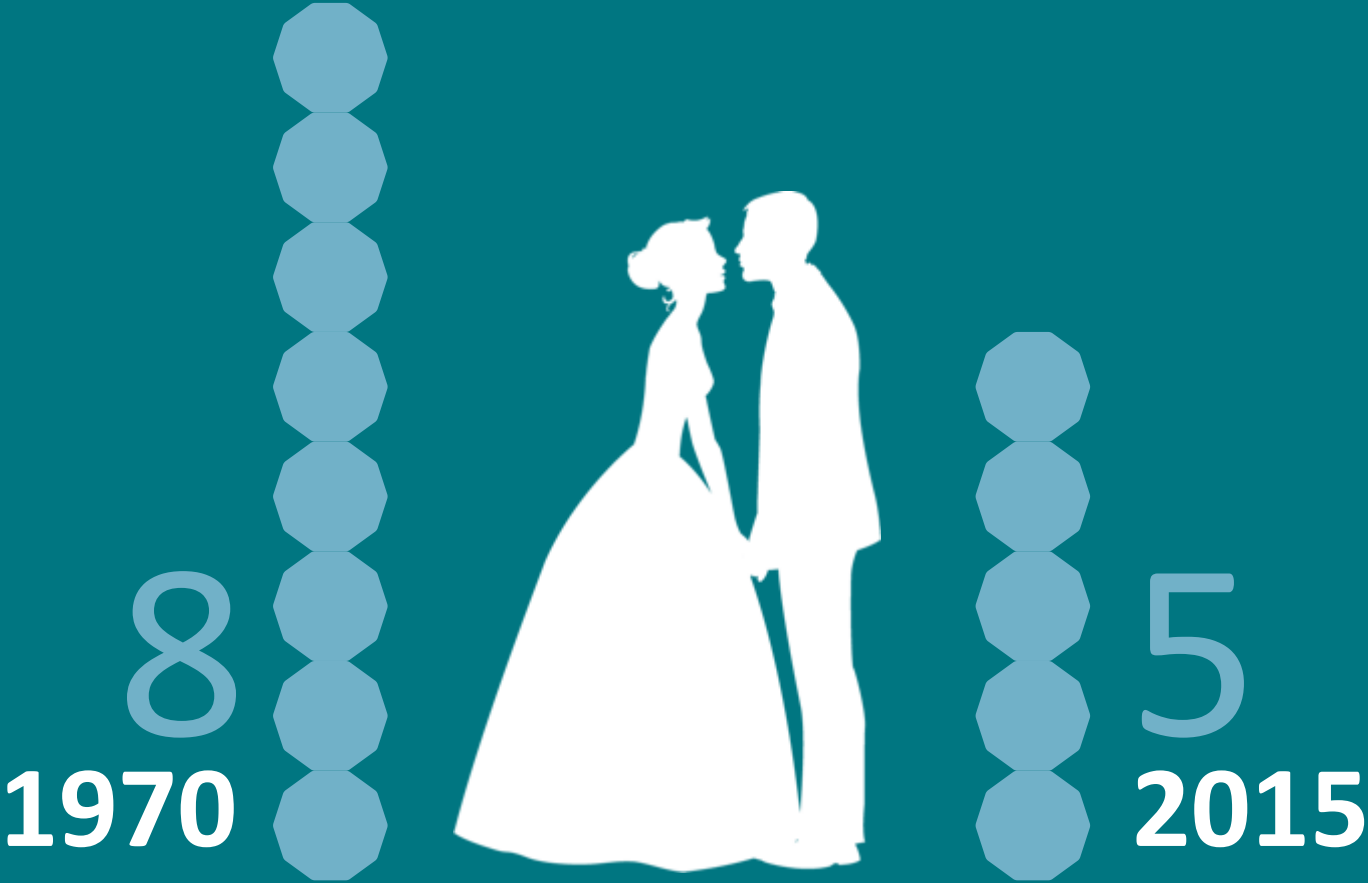
None of these six companies existed twenty years ago

7. Rise of the individual and decline of social cohesion



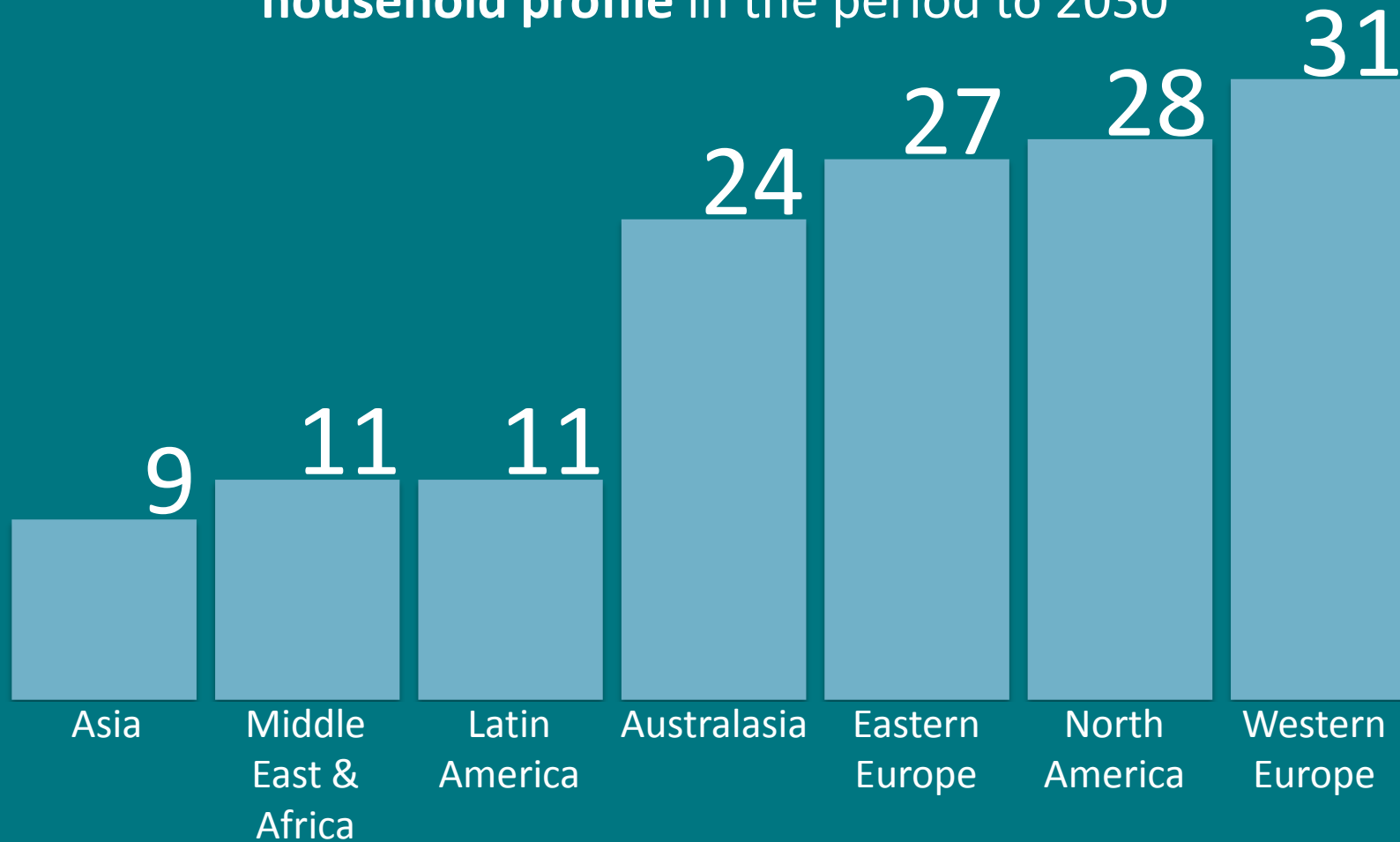
The “traditional”
family structures
are changing

No of marriages per 1,000 population (OECD Countries)



Single person
households are **the
fastest-growing**
household profile in
the period to 2030

Single-person Households: the fastest growing household profile in the period to 2030



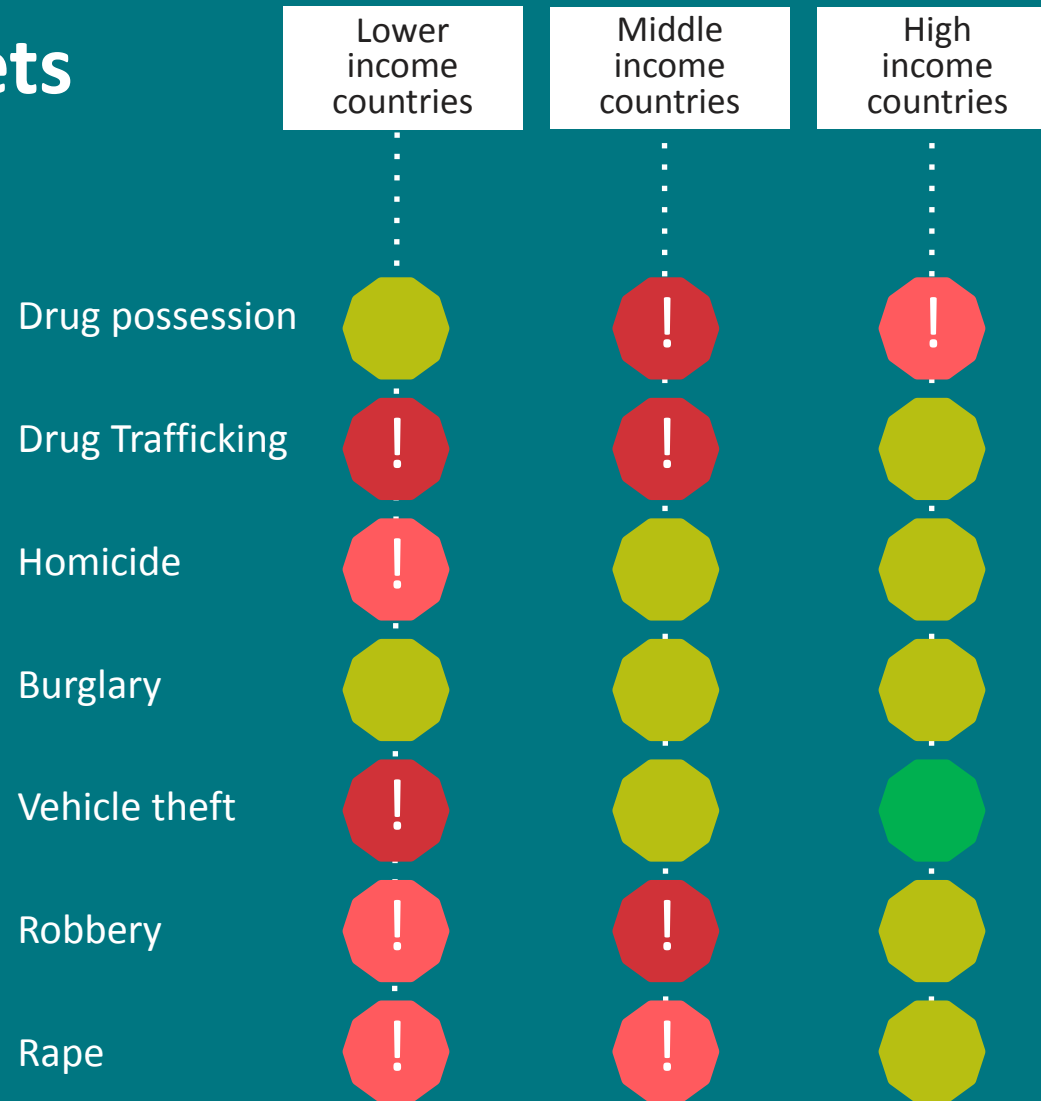
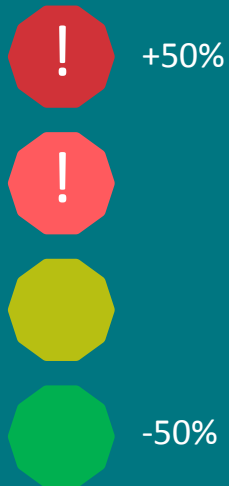
**Cause for
optimism?**
societies are not
breaking down

“**Crime** against the person and against property **is falling** in most rich countries”

The Economist

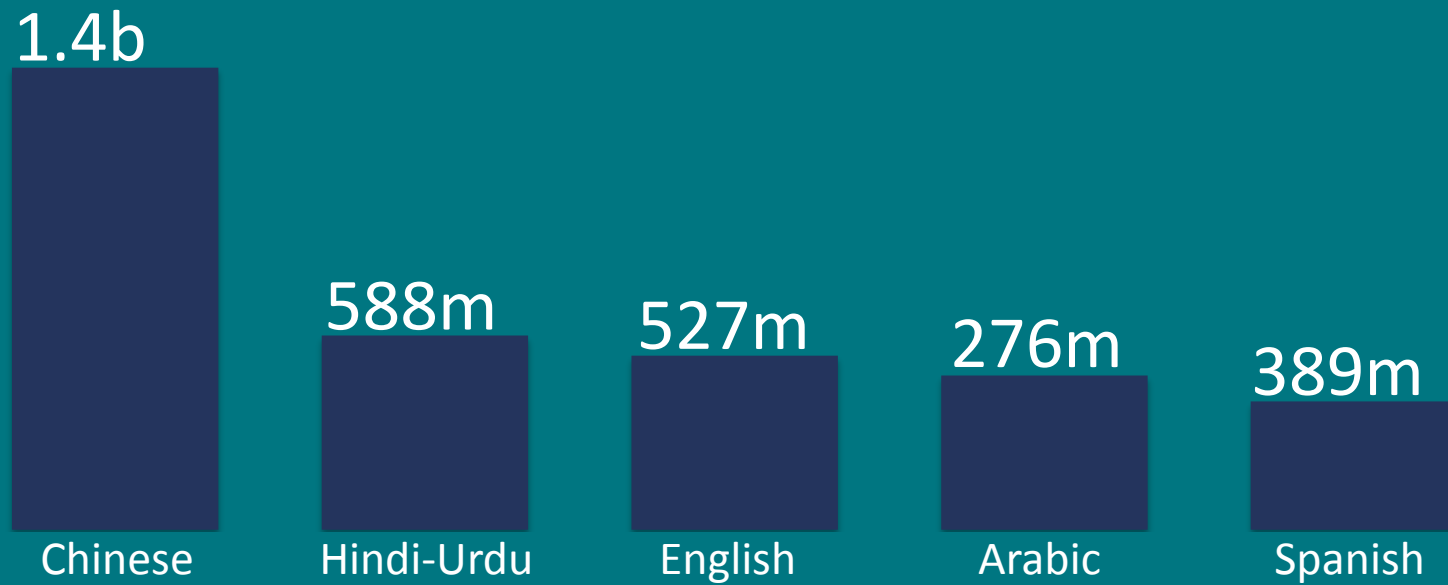
But crime is RISING in developing markets

% change
in different
types of crime, 2003-
2013





8. Cultural convergence and increasing extremes



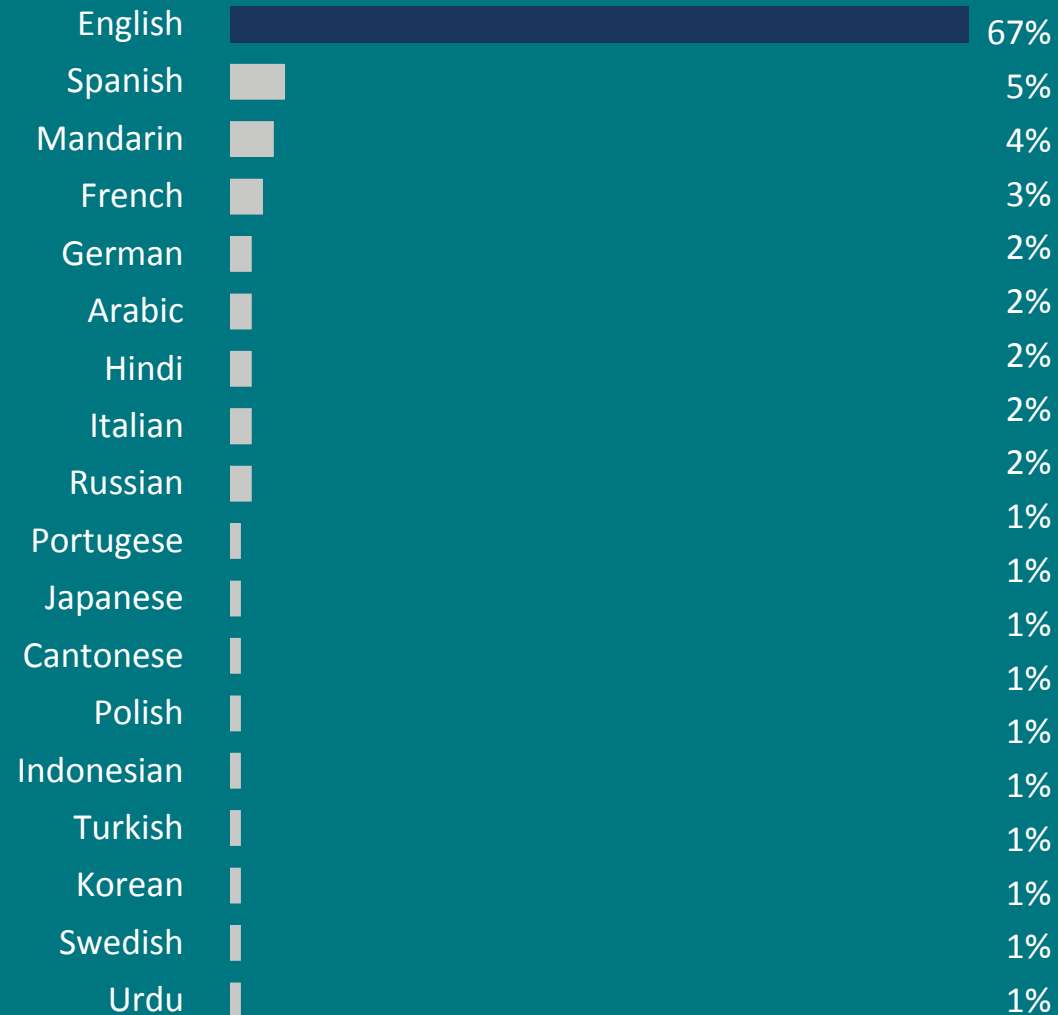
Most native speakers

Cultural convergence



**Case Study:
Those whose jobs
involve interactions
with other
countries**

Languages spoken with colleagues from other countries





Case Study:
Spending our
free time at
the movies

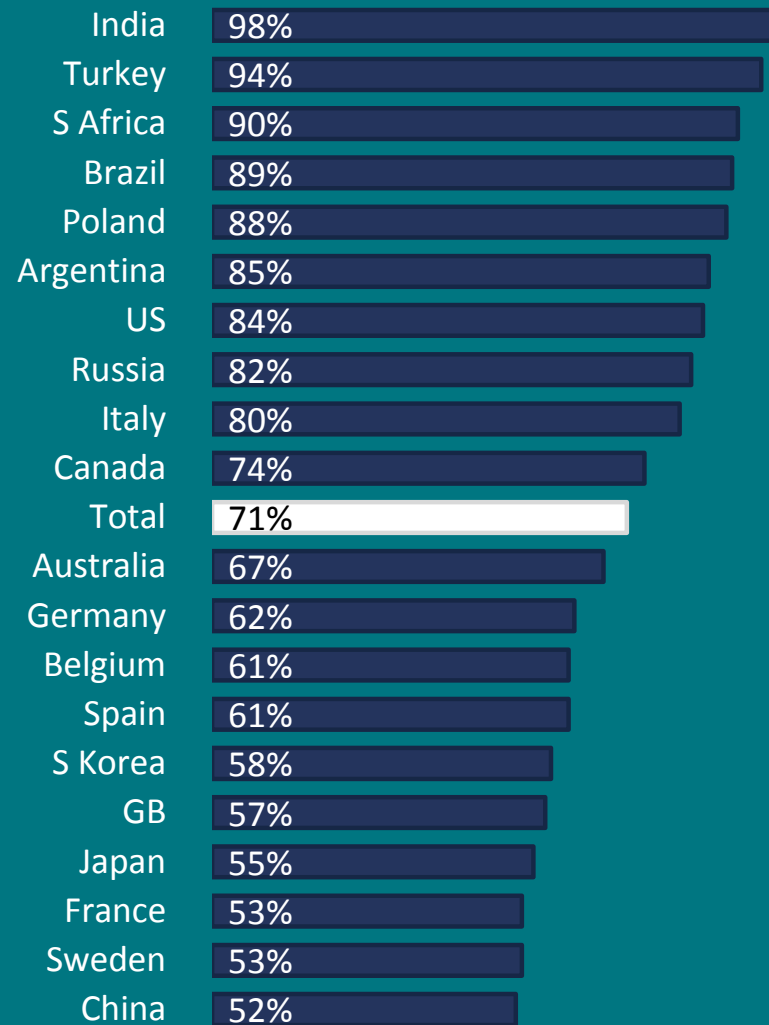
English language continues to dominate

1975 & 2015



**Cultural
diversity:
Is religion uniting
or dividing the
World?**

Most people in the world today identify with a religion



Globally:
65% agree
People have **more**
things in common
than things that make
them different

Turkey:

81% agree

People have **more things in common** than things that make them different

**Globally:
77% agree**

We live in an
**increasingly
dangerous world**

Turkey:
89% agree

We live in an
increasingly
dangerous world

**Globally:
56% agree**

**There are too many
immigrants**

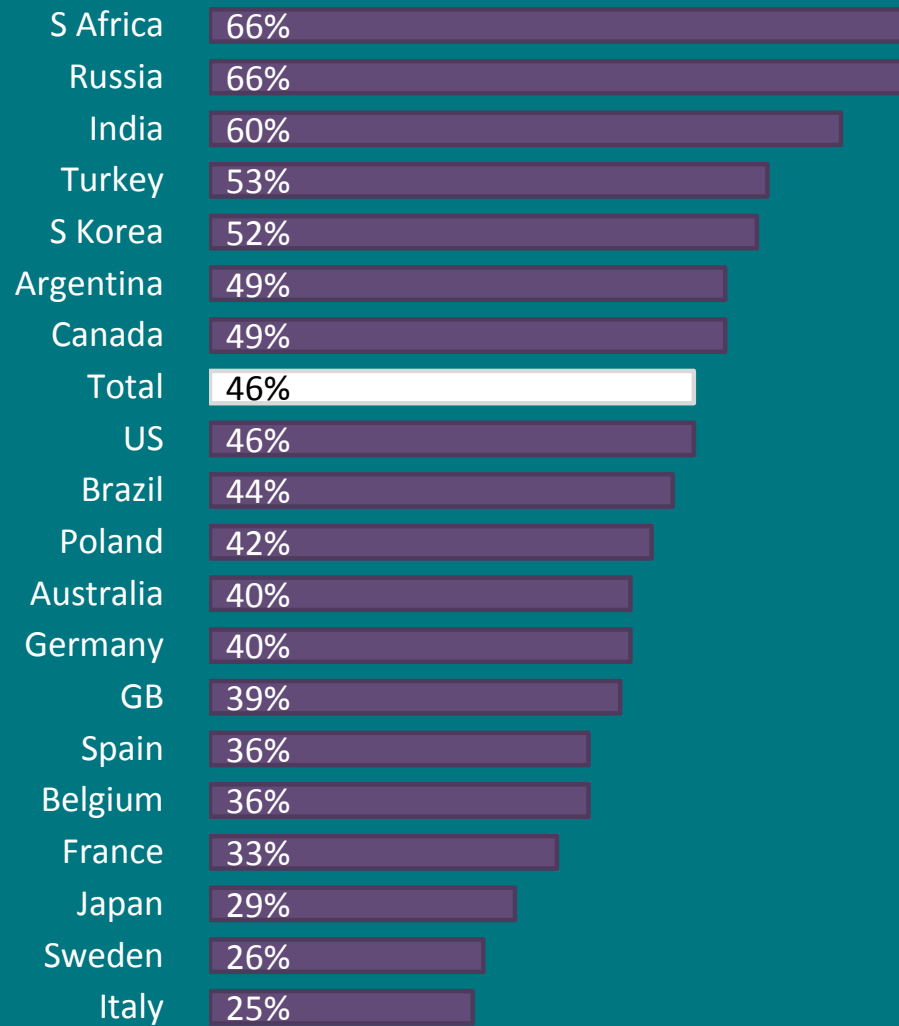
Turkey:
79% agree

**There are too many
immigrants**

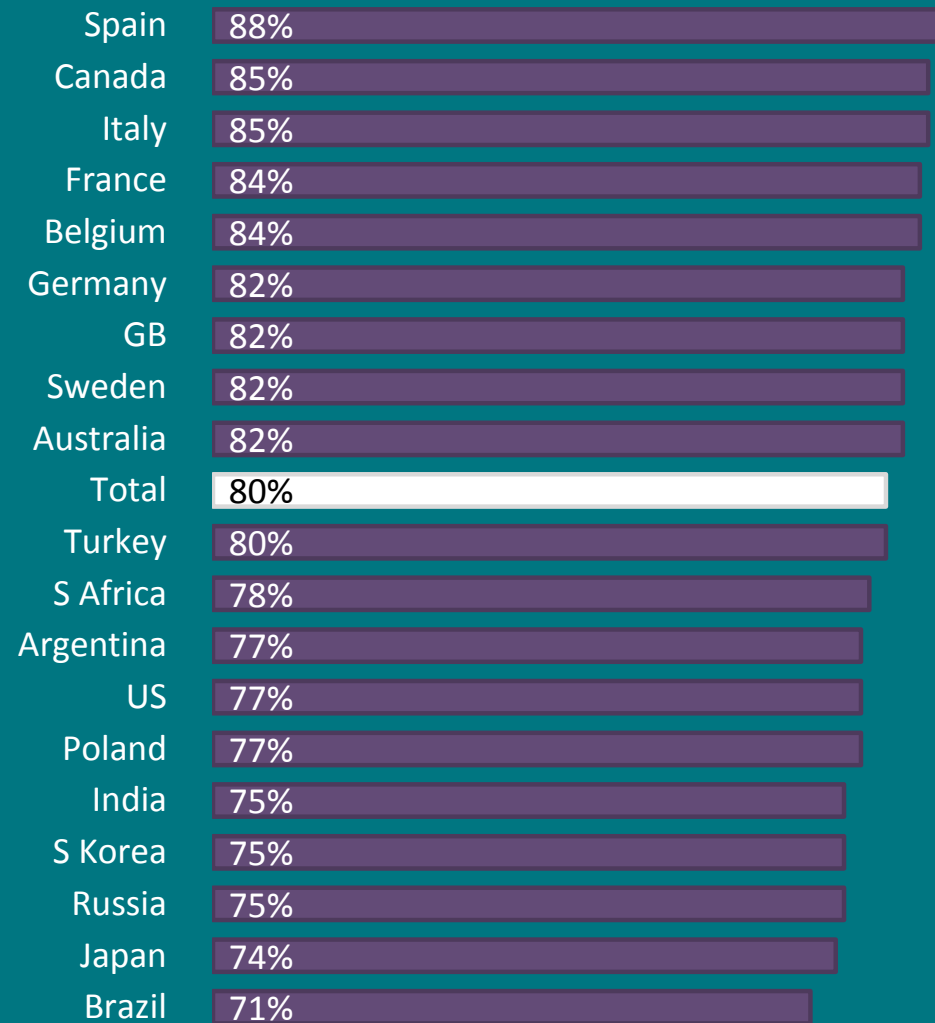
The image is a composite of two photographs of a man in a dark suit riding a bicycle. The top photograph shows the man from the chest up in profile, looking forward. The bottom photograph shows him from the waist down, seated on the bicycle. The entire scene is framed by a thick, dark purple octagonal border. The background of the slide is a solid teal color with a faint, large-scale bicycle wheel pattern.

9. Always on versus off the grid

% agree
I feel under a lot
of pressure **to be**
successful and
make money



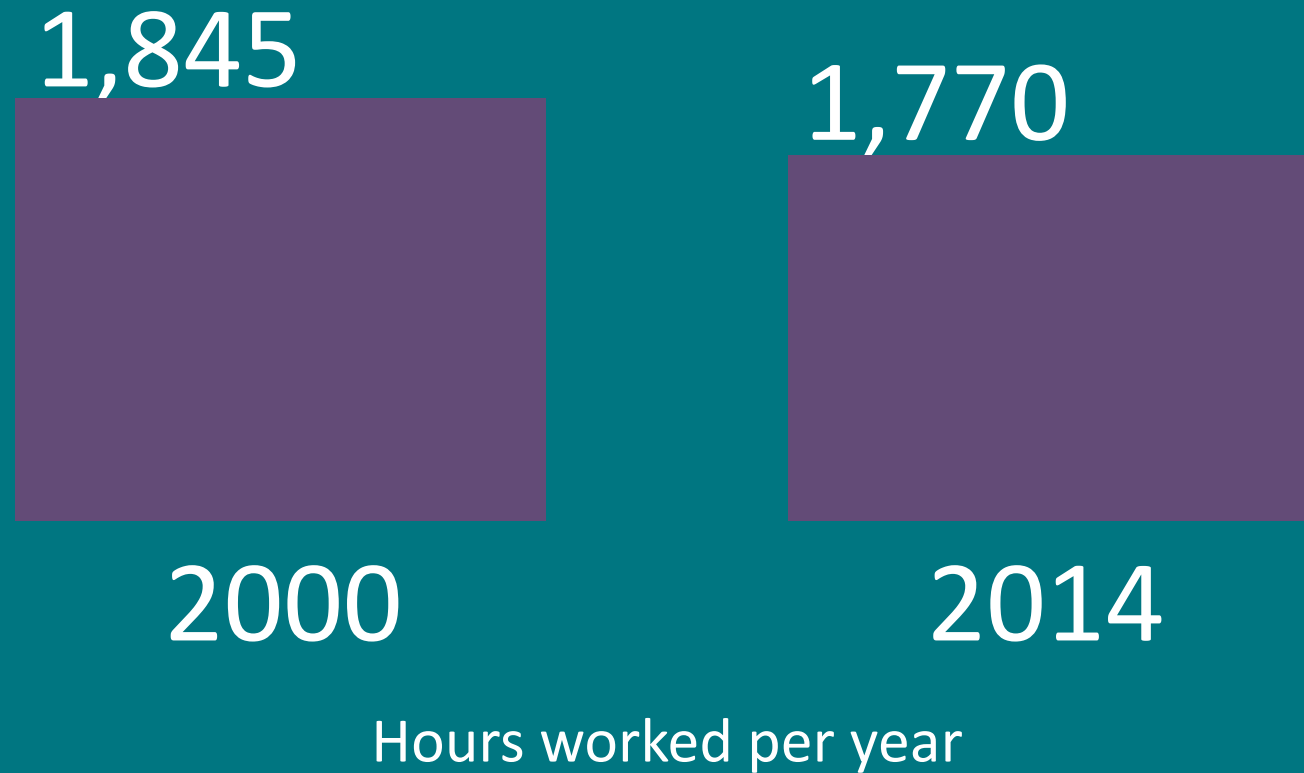
% agree
It is more
important to
have a **good**
work-life
balance than to
have a successful
career



1/5

global employees
now work remotely,
at least some of
the time

In OECD countries, people are **starting** to work fewer hours





want to work for an
organisation
**“with a powerful
social conscience”**

“More or less **all business started out with a social purpose** of some kind...

What’s been lost in recent decades is the **interconnectivity between the needs of society and the innovative dynamism** of business...

So the future may look more like a **rediscovery of this social purpose of business”**

Paul Bakus, President of Corporate Affairs, Nestle



**Maybe we will
have more free
time on our hands
than we expect...**

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CFO JOURNAL.

The New Bookkeeper Is a Robot

By **VIPAL MONGA**

May 5, 2015 2:56 am ET

Robots—basically software—are taking over corporate finance

Deloitte.

cookies at MIT, hospitals

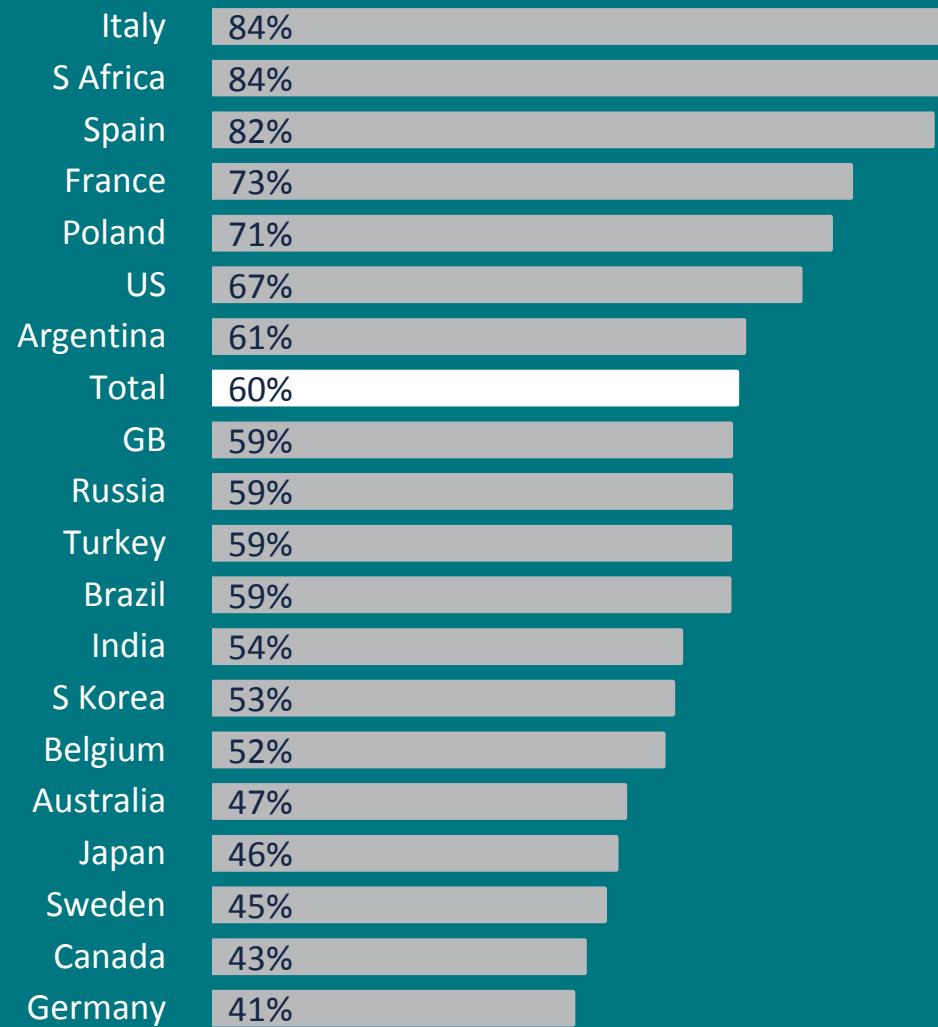


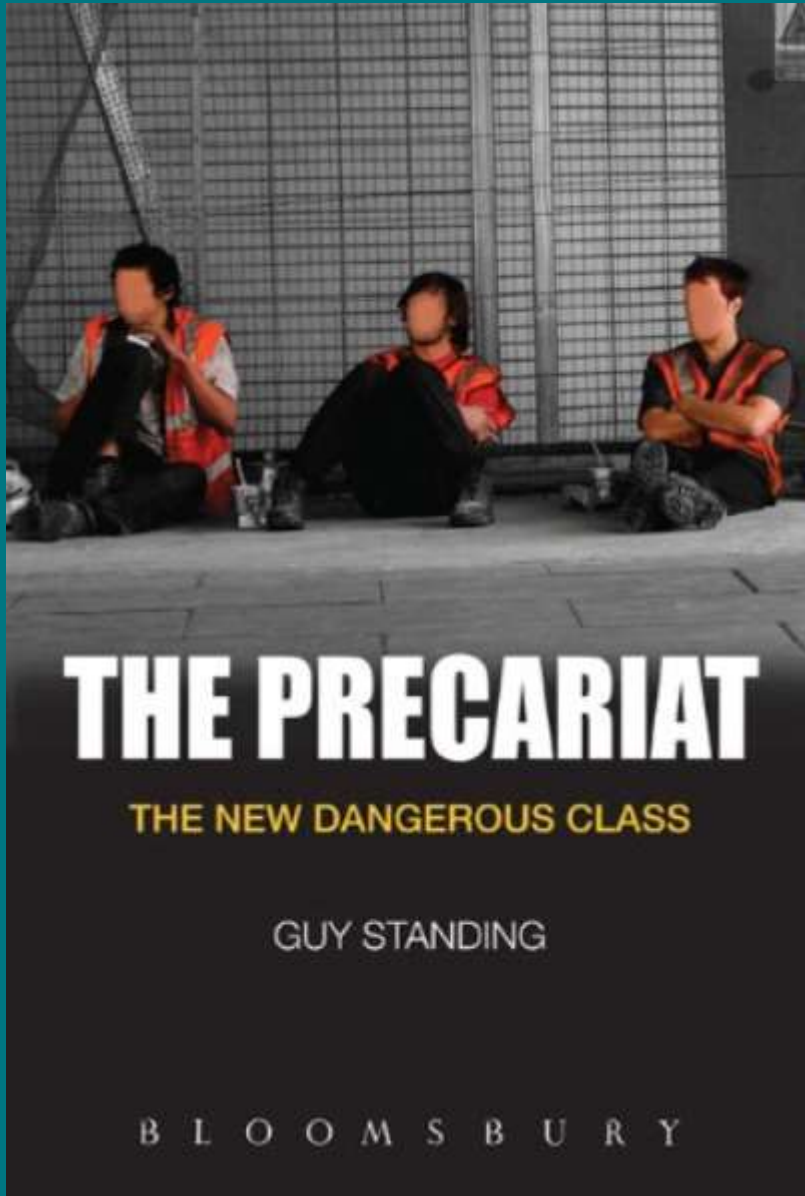
**10. Emergence of
public opinion as
revolutionary force**



Widespread dissatisfaction with how we are governed

% dissatisfied
The way the government is running the country





“The rapid growth of the precariat is producing **instabilities in society**.

It is a dangerous class because it is internally divided, leading to the villainisation of **migrants and other vulnerable groups**.

And its members may be susceptible to the siren calls of **political extremism**”



Mega trends

...that are (re) shaping the world

1. Dynamic Populations



Ageing people?

2. Growing Opportunity and Growing Inequality



The left behind?

3. Megacities



Necessity not choice?

4. Increasing connectedness and decreasing privacy



Changing our behaviour?

5. Healthier and sicker



New illnesses, tired planet?

6. Rise of individual choice and fracturing of the mass market



Will we enjoy the ride?

7. Rise of the individual and decline of social cohesion



How safe will we feel?

8. Cultural convergence and increasing extremes



More tension?

9. Always on versus off the grid



Work-life balance?

10. Emergence of public opinion as revolutionary force



Where are we heading?

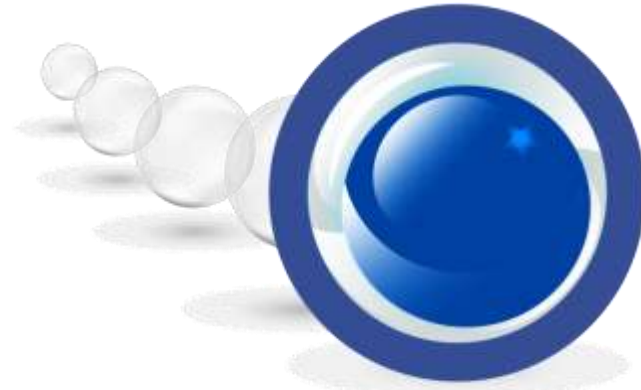


Thank you

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GAME CHANGERS





ARAŞTIRMADA
YENİLİKLER powered by
Ipsos